

CARL D. PERKINS CAREER AND TECHNICAL EDUCATION IMPROVEMENT
ACT, 2006
STATE PLAN ACTIVITIES—2006-2008
SUBMITTED BY: OFFICE OF COMMISSIONER OF HIGHER EDUCATION
ON BEHALF OF THE MONTANA BOARD OF REGENTS

This report provides a summary of the Carl D. Perkins legislation reauthorized in 2006 and the steps taken to create the final Montana State Plan for Career and Technical Education: FY 2008-2012 to achieve the priorities of the new legislation to improve access and success of Montana's students.

I. Overview

The reauthorized legislation (Carl D. Perkins Career and Technical Education Improvement Act of 2006) governing federal funding for career and technical education at the secondary and postsecondary level has several priorities:

- Increase opportunities for individuals to keep America competitive
- Develop challenging academic and technical standards and related, challenging integrated academic and career and technical education instruction
- Prepare students for high-skill, high-wage, or high-demand occupations in current or emerging career fields and clusters
- Promote partnerships among education, workforce boards, business and industry, and community organizations
- Provide technical assistance and professional development to teachers/instructors and administrators
- Increase state and local accountability

The Montana Board of Regents of Higher Education is the designated state board to coordinate the development and submission of the state plan for career and technical education as required by the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Perkins IV). The State agencies responsible for career and technical education in Montana are the Workforce Development Unit of the Office of the Commissioner of Higher Education (OCHE) and the Division of Career, Technical, and Adult Education of the Office of Public Instruction (OPI). Given their close coordination of activities, the State Plan refers to the two agencies as the "Partner Agencies."

The following narrative will describe the process by which OCHE and OPI collaborated to design a state plan for the distribution of funds that would maximize the intent of the reauthorized Carl D. Perkins legislation of 2006.

II. Process for Carl D. Perkins State Plan Development

The U.S. Department of Education gave states two choices for submission of their Carl D. Perkins State Plan. Option one was to submit a one-year transition plan and then a second submission of the full multi-year state plan. Option two was to submit the full six-year state plan. Montana chose option one as it would provide opportunity to consider strategies that would meet the intent of the legislation and strengthen career and technical education programs to meet the demands of the 21st century. It would also enable the CTE community to build upon and adapt the work of the States' Career Clusters initiative begun in 2006.

Throughout the development of both the transition year plan and the multi-year plan, the **State Plan Advisory Committee**, appointed in conformity with the requirements of Montana Law (MCA 20-7-330), provided guidance and insight from the practitioner perspective. Members of the State Plan Advisory Committee included: Jane Baker, Dean, Montana Tech of the University of Montana, in Butte; Mark Branger, Executive Director, Montana Association for Career and Technical Education and CTE Teacher/Administrator, Huntley Project School; Theresa Busch, Local Applications Project Manager, Montana State University of Great Falls; Cheryl Graham, CTE Teacher, Bainville High School; Connie Roope, Training Director, Career Training Institute in Helena; and, Cleo Sutton, Montana BILT Project Manager, MSU-Billings.

Public engagement was not a requirement for the transition year although the state provided information on the new legislation through a series of listening sessions conducted throughout the state.

III. Transition Year Carl D. Perkins State Plan

In April 2007, Montana submitted a one-year Transition Plan for the first year of the Perkins Act. The Transition Plan covered Program Year 2007-08 or July 1, 2007, through June 30, 2008. Through the resources made available from the Act, and the state and local funding for career and technical education leveraged through the federal funds, the State is committed to update career and technical education services and provide more options for students. To accomplish this goal, several decisions were made during the transition-year that governed the direction and content of the multi-year state plan. The major decisions were:

1. Establish a State Executive Leadership Team and State CTE Advisory Committee
2. Create Big Sky Pathways (BSP)
3. Decline to merge Tech Prep Title II into Perkins Title I funding structure
4. Transform Tech Prep from a regional service area to a statewide consortium
5. Target reserve funds to support local eligible recipient needs

Leadership Structure

In implementing the new Perkins Act, Montana OCHE (the eligible agency) and Montana OPI collaborated on program development and oversight. The "Partner Agencies" created a joint leadership structure to provide ongoing review of state activities and progress in improving CTE programs.

The State Executive Leadership Team (SELT) makes key decisions regarding the allocations of Title I Perkins funds, including the “reserve funds” under Section 112 and leadership funds under Section 124. SELT also oversees the statewide Title II Tech Prep consortium activities, with input and guidance from agency staff and Tech Prep staff. SELT will also engage a State CTE Advisory Committee representing the Montana Career Cluster framework, which includes 6 career fields, 16 clusters, and 81 pathways.

Big Sky Pathways

Big Sky Pathways will be designed as programs with clear plans of study that integrate rigorous academic courses with relevant curriculum. The intent is to help students explore career fields during high school, complete high school and, if they choose to do so, make a smooth transition into postsecondary studies in that area of study.

Under this new plan, over time many of the State’s Career and Technical Education offerings will be merged into Big Sky Pathways that connect to Montana’s two-year degree providers and also its state university programs. In addition, during implementation of the new Perkins Act, all CTE programs (at the high school and postsecondary levels) will benefit from upgraded curriculum, high-quality technology, and ongoing training to help CTE teachers demonstrate excellence in their knowledge of current industry standards and good teaching practices.

Tech Prep

Under the reauthorized Perkins legislation of 2006, Tech Prep is maintained as a separate authorization, with states having the option of merging the Tech Prep funding stream with that of the basic state grant. If a state chooses to merge funding streams, then the funds previously allocated to Tech Prep would be governed by all of the requirements of Title I – including distribution by the Title I formula, uses of funds. The State of Montana did not take the option of merging Title II Tech Prep funding into Title I of the Perkins basic state grant; therefore, Tech Prep is maintained as a separate title-Title II.

Montana’s Tech Prep organization will be shifted from a regional service area approach to having a Tech Prep interface for establishing statewide activities around six broad career fields. Members of the consortium will focus on developing model programs of study (known as *Big Sky Pathways*) and will also be available for use by other school districts and colleges within Montana. The State may use leadership funds and/or reserve funds to designate certain sites for additional development and implementation activities coordinating with the redesigned Tech Prep activities.

Reserve Funds

National funding for the Perkins Act is a little over \$1.1 billion. As a small state, Montana’s allocation of the Perkins Act funds in fiscal 2007 was about \$6 million. The State holds five percent of the funds for state administration of the program and 10 percent for coordinated “leadership activities.” Of the remaining 85 percent for local programs, up to 10 percent is

allocated to local recipients through a “Reserve Fund” for special initiatives and activities. The remainder of local funds is distributed to school districts and two-year colleges, with 65 percent of these funds directed to secondary CTE programs and 35 percent to postsecondary CTE programs.

During the transition year, Montana maintained the status quo mechanism for Reserve Funds—allocating funds through a competitive process requiring that applicants partner with an eligible recipient and meet designated priorities required by the Request for Proposal structure.

IV. Multi-Year Carl D. Perkins State Plan

As required by Perkins legislation, the “Partner Agencies” jointly conducted two public hearings for the purpose of affording all segments of the public and interested organizations and groups an opportunity to present their views and make recommendations regarding the State Plan. These public hearings were conducted via video teleconference to enable widespread participation.

The video teleconferences originated in Helena directed by the OCHE State Director for Workforce Development and Office of Public Instruction Division Administrator for Career and Technical Education. Seven other sites were involved in the events. Three sites were in the largest population centers in the state: Billings in the South-central part of Montana, Great Falls in the Central part of Montana, and Missoula in the Western part of the state. Other teleconference sites included Miles City in the far Eastern part of the state, Havre in the North-central, Bozeman in the Southwest, and Kalispell in the Northwest.

A public hearing log, copy of the hearing notice, mailing lists used for notification, and a summary of recommendations and comments made by attendees can be accessed through the OCHE website at <http://mus.edu/wd/>.

In 2008, OCHE submitted its Multi-Year Montana State Plan for Career and Technical Education covering the period of Program Years 2008-09 through 2012-13.

The decisions made during the transition year governed the direction and content of the multi-year State Plan; therefore, a description of the implementation of these decision points and the U.S. Department of Education requirements for submitting the Multi-Year State Plan will be the focus of this section. The key issues to be addressed throughout the duration of the state plan are as follows:

- *Implementing Career and Technical Education Plans of Study*
- *Re-organizing Tech Prep to Support Big Sky Pathways*
- *Strengthening Accountability for Results*
- *Assessing Career and Technical Skills*
- *Integrating Academic and CTE Skills and Knowledge*
- *Building a Corps of Effective CTE Teachers*
- *Ensuring Effective Instruction and Strategies for Special Populations*
- *Connecting CTE to Employers and Workforce Priorities*

Perkins Legislation: Under Perkins IV, states have the responsibility to create and/or recognize a series of CTE offerings called “CTE Programs of Study.” These Programs of Study will be adopted by local recipients at high schools, regional CTE schools, and community and technical colleges. Each Program of Study is meant to be a cohesive set of academic courses paired with CTE courses, with mechanisms that connect the high school program to postsecondary programs. Ideally, Programs of Study should have closely aligned content that does not duplicate and allows qualified students to earn college credits while still enrolled in high school. The CTE Program of Study is also designed to culminate with a recognized credential or degree at the community or technical college level, and can also be designed to lead to a baccalaureate degree.

Montana Plan: Montana is placing increased emphasis on the development and continuous improvement of a seamless system of education that supports smooth student transitions from one educational system to another and from one level of instruction to another. The new requirement for “programs of study” complements this priority that Montana has established.

Montana refers to its CTE “programs of study” as “*Big Sky Pathways (BSPs)*.” While Montana will not design BSPs for all the 81 identified career pathway options, the BSPs that are developed within a Cluster will cover the Foundation knowledge and skills appropriate to that Cluster. Each BSP will include pathway-specific knowledge and skills taught at the secondary level and will also include occupational specialties taught in postsecondary courses offered by two-year postsecondary institutions and by baccalaureate-granting institutions. The occupational specialties within a BSP (job-specific skills and knowledge appropriate for specific job preparation) will be primarily taught at the postsecondary level.

The initial set of BSPs have been identified and made available to Local Education Agencies (school districts) and postsecondary institutions. Beginning with the program year 2007-2008, each LEA and postsecondary institution that is a recipient of Perkins funding began planning for implementation of at least one program of study. That planning continues, as of this report, with these projected outcomes:

- The school districts’ or colleges’ BSPs are to be offered as options to students (and their parents as appropriate) when planning for and completing their future coursework for career and technical content areas.
- Each Big Sky Pathway will indicate one or more postsecondary level credentials, certificates, or degrees which are available.
- The BSP can also be customized so it is most relevant to the local job market.
- Each BSP indicates CTE and Academic Courses (and possible electives) available to the student, as well as the courses that are eligible for advanced college credit.
- Other BSPs will include coursework that is articulated so it leads directly into a registered apprenticeship program.

Reorganization of Tech Prep

Perkins Legislation: Tech Prep saw several major changes enacted in Perkins 2006 aimed at making the results of Tech Prep more measurable and more closely connecting Tech Prep activities with other CTE activities in the state. First, a specific definition of a Tech Prep student allows for consistent measurement of Tech Prep results. Multiple new performance indicators apply to Tech Prep students, in addition to the general performance indicators that apply to all CTE students. The state's Tech Prep plan must be closely integrated with the state's general CTE plan. If a state chooses to do so, it may merge Tech Prep funding into the general state grant program and therefore be relieved from the programmatic requirements of Tech Prep.

Montana Plan: Tech Prep is retained as a separate funding stream, but is significantly redirected in its implementation. A reformulated Tech Prep system, launched in the Fall of 2007, is a key player in Montana's updated CTE delivery system. The statewide Tech Prep consortium, known as the *Big Sky Pathways Consortium*, is taking a leadership role in developing and supporting *Big Sky Pathways* with each of the Career Clusters.

Through a competitive process, one statewide Tech Prep consortium was created. Flathead Valley Community College is the lead institution for the *Big Sky Pathways Consortium* (aka *Peaks to Plains Consortium*), and its partner from the eastern region of the state is Montana State University – Billings College of Technology. This single consortium is designed to provide administrative leadership for Tech Prep, to function as a clearinghouse for information and resources; to designate other postsecondary institutions in the state to develop specific career clusters and related pathways; and to provide the model for development of *Big Sky Pathways* (programs of study) for local Perkins projects. The consortium will utilize the following six Career Fields and their respective Tech Prep *Big Sky Pathways* for Montana:

- Agriculture and Natural Resources
- Engineering and Industrial Technology
- Health and Related Services
- Social and Human Services
- Business, Management and Information Systems
- Arts and Communications

Through the work of *Big Sky Pathways Consortium*, model articulation agreements and statewide articulation agreements will be developed. These agreements will allow for transition from high school to two-year postsecondary institutions and, where appropriate, to four-year institutions.

Strengthening Accountability

Perkins Legislation: The Perkins accountability system holds States and Local Recipients (school districts and community colleges) accountable for the achievement of students in a series of performance indicators. The performance indicators fall into three categories: skill attainment, retention and completion, and transitions. High school programs must measure academic achievement and high school graduation; technical (career-related) skill attainment; and

transitions to college, employment, or the military. Postsecondary indicators include technical skill attainment; program retention and completion; and transitions to further postsecondary education, the military, and employment. Programs at both levels are also accountable for “non-traditional” participation, meaning the percentage of young men and women that participate in a CTE program for which their gender is significantly underrepresented.

Performance targets are established for each of the indicators at the state level and then also by each Local Recipient based on the state performance target. If the state or local recipient does not meet its performance target for any one of the indicators, it must create a plan of action to improve performance on that indicator. In concert with the state or local improvement plan, the federal or state government must provide technical assistance to help improve performance. Under certain circumstances, if a state or local recipient fails to make necessary improvement against the indicators, the federal and state governments are authorized (but not required) to implement various levels of sanctions.

Montana Plan: For the Multi-Year State Plan, Montana has chosen to continue using its “blended” option to define CTE Concentrators at the secondary level. Because of the extreme rural nature and small size of many Montana high schools, it would not be practical to only measure students who took three or more credits of CTE courses in a single program area. By using the “blended” option, which includes any student who takes three or more courses in any CTE program area, more students in small rural settings will be included and the resulting accountability system will have more relevance for local program improvement. OPI has developed an agency-wide data collection system called Achievement in Montana (AIM) that began use during the 2007-2008 school year. The use of this secure system is enhancing the reliability of data collected by OPI.

When the Partner Agencies have reached agreement with the U.S. Department of Education about the adjusted level of performance for each of the secondary and postsecondary indicators, each of the Partner Agencies will notify school districts and two-year colleges of what level has been established and offer the opportunity for negotiation over one or more of the adjusted levels of performance. As the new performance indicator data is gathered and reported, districts and colleges will be accountable for performance on the indicators. If they fall short of their performance targets, OCHE and OPI will work closely with them to offer technical assistance and implement improvement plans to improve performance on a program-by-program basis.

Assessing Career and Technical Skills

Perkins Legislation: The law (Section 113(b)(A)(ii)) says each state must develop an indicator relating to “student attainment of career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry-recognized standards, if available and appropriate.” This requirement will require a more consistent approach to measuring technical skill attainment, using assessment instruments that are valid, reliable, and based upon industry-recognized standards, where they are available. States are not required to use industry-based credentials for every program, nor are they required to use exactly the same measurement approach for all their programs. Whatever assessments approaches are used, however, should be based on standards (when such standards are available) and must meet

criteria for validity and reliability. In short, assessment approaches must accurately and consistently measure the attainment of technical skills across programs in the state.

Montana Plan: Both OCHE and OPI believe that, when fully developed, an upgraded technical skills assessment system will allow greater comparability and accountability for program improvement. To implement this new requirement for technical skills assessment, OPI is conducting a survey of its CTE programs to determine what assessments are currently in place. OCHE is also reviewing the use of program assessments, including the use of vendor-based assessments and Industry-Based Certifications.

During 2008 and 2009, the agencies will work closely with teachers and administrators from local programs to identify which competencies should be assessed in each of the *Big Sky Pathways* and other CTE courses and determine the most appropriate assessment mechanisms. OCHE and OPI will ensure that the assessments selected or recommended meet a standard of validity and reliability, are affordable to use on an ongoing basis, provide relevant data on student CTE achievement to inform teachers' instructional practices, and form the basis of a meaningful accountability system supporting the goal of continuous program improvement.

Specifically, the state will examine the viability of state-development tests and scoring rubrics for observation of demonstrated student skills. These classroom-based assessments will be aligned with generally accepted and industry-recognized skill standards and will be administered consistently within each CTE program area.

Integration of Academic and CTE Knowledge and Skills

Perkins Legislation: The Perkins Act of 2006 emphasizes the importance of integration of academic and career technical education. One of the key purposes of the Perkins act is to promote the development of services and activities that “integrate rigorous and challenging academic and career and technical instruction.” As they create plans for their Perkins funds, local schools are required to demonstrate how they will “improve the academic and technical skills of students...through the integration of coherent and rigorous content aligned with challenging academic standards and relevant career and technical education programs...”

Montana Plan: During implementation of the 2008-2012 plan, OPI will revise the ***Montana Standards and Guidelines for Vocational and Technical Education***. These are the standards by which CTE programs are evaluated and approved at the secondary level. During the process significant opportunity for public input and involvement of educators will be provided as program standards are reviewed and programs are aligned with the *Big Sky Pathways*. Accreditation standards in technology, workplace competencies, and career and vocational/technical will be used as the basis for aligning curriculum.

As part of the Standards and Guidelines review, OPI (in coordination with the *Big Sky Pathways Consortium*) will launch a curriculum crosswalk process. In this process, CTE teachers will be engaged to identify state academic standards that are appropriate to be integrated into each BSP and each CTE course. The academic standards will be identified on a course-by-course basis so teachers know exactly what integration is appropriate. OPI will include Montana CTE teachers

and will also draw upon other national resources and models, to provide sample instructional resources to assist in academic integration.

Related processes to support academic/CTE integration will also include:

- Strengthening the focus on Academic/CTE Integration in program approval and program renewal applications
- Creating a monitoring rubric relating to Academic/CTE Integration that will be incorporated into OPI's monitoring and technical assistance visits and technical assistance to be provided when a school district has failed to meet its performance targets for academic skills attainment.

Based on the information gathered each year from monitoring and technical assistance visits and from applications for program approval and renewal, OPI will prepare an annual summary for internal review of the progress that Montana CTE secondary programs are making with regard to Academic/CTE Integration.

Building a Corps of Effective CTE Teachers

Perkins Legislation: The Perkins Act calls on states to offer “comprehensive professional development for career and technical teachers, faculty, administrators, and career guidance and academic counselors.” The new law says that State Leadership Funds must be used for professional development programs that are “high quality, sustained, intensive, and classroom-focused in order to have a positive and lasting impact on classroom instruction and the teacher’s performance in the classroom and are not 1-day or short-term workshops or conferences.” This limitation **does limit the use of local funds for professional development**, but is a significant change in the use of state leadership funds. Another element of the state plan (Sec. 122 (c)(3)) indicates the state must have a plan for improving “the recruitment and retention of career and technical education teachers, faculty, and career guidance and academic counselors,” as well as for improving “the transition to teaching from business and industry.”

Montana Plan: Montana recognizes the significant need for professional development that is “high-quality, sustained, intensive, and classroom-focused,” as stated in Section 124 of the Perkins Act, as such, the Partner Agencies are taking action to reform and strengthen the culture of professional development for teachers and administrators.

OPI has developed a new professional growth model known as the Extended Learning Experience (ELE). The ELE strengthens and deepens teacher knowledge through a weeklong, summertime professional development experience. The Partner Agencies are also exploring a new approach to professional development that would be built around identifying the knowledge and skills every CTE teacher and faculty member should possess. As these new models of professional growth are developed, Perkins recipients will be asked to explain how their proposed uses of funds will identify and strengthen the skills and knowledge that teachers and administrators need to be successful.

Montana will also explore developing and implementing a professional growth concept known as the “Community of Practice.” A “Community of Practice” is a group of interested

teachers/faculty, administrators, and counselors that come together during a fixed length of time to focus activity and learning around a particular challenge or promising practice.

Building and maintaining Montana's CTE teaching force may be one of the biggest challenges facing the state and its school districts and colleges. The first challenge is to have a clear understanding of the options for action. To create a workable strategy for these issues, the *State CTE Executive Leadership Team* will convene a *CTE Teaching Force Study Group* to examine the issue of teacher supply and retention. The Study Group will examine data to address a variety of issues about the supply of Montana's teachers, and recommend strategies for replenishing the current teaching workforce as retirements and departures take effect.

Ensuring Effective Strategies for Special Populations

Perkins Legislation: Perkins Act of 2006 identifies the following students as "special populations":

- individuals with disabilities
- individuals from economically disadvantaged families, including foster children
- individuals preparing for non-traditional fields (*for their gender*)
- single parents, including single pregnant women
- displaced homemaker
- individuals with limited English proficiency

In its plan, each state must describe the program strategies for special populations, including a description of how it will ensure that students receive access to CTE activities, will not be discriminated against, and will be provided with programs that are designed to help meet or exceed the State and local performance targets on the performance indicators.

Montana Plan: For some time, the emphasis in the Perkins Act has been on non-discrimination and equal access to services for special populations and extensive procedures to ensure these protections are already in place. Now, in concert with similar accountability requirements in ESEA that provide greater scrutiny to academic performance of students in certain sub-groups, there is a renewed urgency to discover educational strategies to improve student performance and close achievement gaps for CTE students in special populations.

Montana will provide leadership to assist school districts and two-year postsecondary institutions to gather and share information about strategies for special populations that show promising outcomes and can be implemented with reasonable costs. Montana refers to this activity as its *Promising Practices Initiative*.

As part of the Initiative, the Partner Agencies will analyze program data on the performance of special populations against the performance indicators used under Perkins 1998 as well as other relevant data already collected by school districts or two-year postsecondary institutions in Montana. The Partner Agencies will also survey teachers and faculty, administrators, and coordinators focusing on the needs of special populations to determine what are perceived to be the biggest knowledge gaps about promising practices relating to special populations.

Using this information, the **State CTE Executive Leadership Team** (with input from staff and the State CTE Advisory Committee) will create a plan for the strategic use of state funds for identifying and sharing promising practices for services to Special Populations.

Connecting CTE to Employers and Workforce Priorities

Perkins Legislation: A newly stated purpose of the Perkins Act is “*providing individuals with opportunities throughout their lifetimes to develop, in conjunction with other education and training programs, the knowledge and skills needed to keep the United States competitive.*”

In this purpose, Congress drew a careful balance helping individuals grow and advance in their areas of interest and aptitudes, but also making sure that available programs are focused on those that help keep the United States competitive.

Also, throughout the Act, there are multiple references to preparing students for jobs that are “high skill, high-wage, or high-demand” in “current or emerging occupational areas.”

Montana Plan: While there is not a federal definition for the terms “high-skill, high-wage, or high-demand,” Montana, in coordination with the Montana Department of Labor and Industry has developed a methodology defining the criteria. This definition will be applied to every CTE program that is supported by Perkins funding:

“High Skill Occupation:

- The occupation requires completion of an associate degree, postsecondary career technical education, more than 12 months of on-the-job training, or a combination of work and formal training; or,
- At least half of the 10 basic O*NET skills for this occupation are ranked at or above 50% in importance and at least 5 of the other O*NET skills required for this occupation are at or above 50% in importance.”

“High Demand Occupation:

- *The occupation* has a greater than average projected annual job growth rate for Montana (1.6% using 2004-2014 projections); **or**
- The occupation has at least 50 annual average job openings *in Montana.*”

“High Wage Criteria:

- *The occupation* has an average annual wage which is greater than the wage at the 75th percentile (\$39,615 in 2006) for occupations in the state of Montana.”

In the program approval and review process, OCHE and OPI will ask each eligible recipient to explain how each program area relates to current or emerging occupational opportunities using the “high-skill, high-wage, or high-demand” criteria. If local conditions for employment warrant a determination that a targeted occupation does not meet the state criteria, but is appropriate for the local area, the local recipient may appeal to the **State CTE Executive Leadership Team** to resolve the issue. Montana will also require that eligible recipients indicate how business and industry is giving input into the CTE curriculum. Programs that do not have affiliations with business and industry are required to establish and maintain a business and industry affiliation in order to be eligible for funding.

VI. Financial Requirements

Funds received through the allotment made under Section 111 will be allocated between secondary and postsecondary Career and Technical Education.

Sections 131 and 132

Eighty-five percent (85%) of the funds will be allocated under Section 131 and Section 132. Ten percent (10%) of the eighty-five percent (8.5%) will be used in accordance with Section 112 (c)(Reserve).

Taking into account the Reserve Funds, the remainder of local funding will be allocated as follows: Sixty-five percent (65%) will be allocated to secondary career and technical education and thirty-five percent (35%) will be allocated to postsecondary career and technical education.

This distribution of funds is a result of the consultation between OCHE and OPI, reflecting upon input given the State Plan Advisory Committee established under Montana Law (MCA 20-7-330). In the judgment of the Partner Agencies, this distribution is equitable and provides a reasonable allocation of scarce resources to provide quality CTE services. It is built upon a tradition of previous practice in Montana and also reflects the current policy direction of more closely aligning and connecting secondary and postsecondary CTE within Montana.

Reserve [Section 112]

Montana is retaining a 10 percent Reserve fund as allowed by the Perkins legislation. As the role of the State CTE Executive Leadership Team is to ensure coordination of Perkins activities across educational and workforce systems and to set priorities for activities that have a statewide impact and promote innovation in CTE programs and services, the State CTE Executive Leadership Team, in consultation with the State CTE Advisory Committee, will determine the priorities for allocation of the Reserve fund. The final decision will be the responsibility of the State CTE Executive Leadership Team as the fiscal and programmatic administrators of the Perkins grant.

The options available for consideration will meet the required and permissive uses listed in Section 135 of the Perkins legislation. The priorities may include, but are not limited to: Professional development, career and technical student organizations, skill assessments at the secondary and postsecondary level, curriculum and product development, integration of academic and career and technical knowledge and skills, use of technology, support for programs of study, and services for special populations.

Role of Montana-Based Non-Profit Organizations

In 2007, OCHE and OPI agreed to a Memorandum of Understanding by which \$360,000 was designated out of FY 2007 Reserve Funds to provide services, in accordance with the programmatic purposes of the Act, for activities to be carried out during the biennium through eligible institutions directed to Montana-based non-profit organizations, with a focus on

community-based organizations that have established ties at the community level. Six two-year awards were subsequently made to partnerships between eligible institutions and schools working with Montana-based non-profit organizations.

In the Summer of 2008, each recipient of the specially designated Reserve Funds submitted an interim report. The State CTE Executive Leadership Team has determined that sufficient progress has been made to continue the second year of funding for each of the Recipients. Each Recipient will submit a final report on the project in late summer of 2009.

The State is strongly committed to improving services for special populations and supporting the involvement of Montana-based non-profit organizations with established ties at the community level, where appropriate. Therefore, beginning with program year 2009-2010 through 2012-2013 (after the current MOU has expired), Montana will set aside approximately \$180,000 annually (depending upon the allocation of the federal funds) to award on a competitive basis to support projects that develop and refine strategies to serve special populations successfully. In each application submitted by a school district, a postsecondary institution, or jointly between two or more such entities, the applicant must demonstrate that one or more Montana-based non-profit organizations were given the opportunity to play a significant role in the project.

State Leadership [Section 124]

Individuals in Institutions

As described in Section 112(a)(2)(A) of the Act, up to 1 percent of the State's entire allocation may be set aside from State Leadership Funds to support CTE services in state institutions. Montana will make 0.5 percent of the State's Perkins state leadership allocation available to an agency, organization or institution serving individuals in state institutions. Funds will be awarded through a competitive grant or contract process.

Nontraditional Training and Employment

The amount to be made available under Section 112 (a)(2)(B) to support nontraditional training and employment services will be \$60,000. Funds will be allocated through a competitive RFP.

Remainder

After accounting for leadership funds expended for individuals in institutions and non-traditional services, the remaining state leadership funds will be allocated as follows: Fifty percent for secondary (OPI) and fifty percent for postsecondary (OCHE). These funds will be used for the six remaining required uses of Section 124 and appropriate permissible uses.

State Administration [Section 121]

The amount to be expended for state administration under Section 112 (a)(3) is five (5.0) percent of the total grant, and a state match is required. These funds will be allocated as follows: Sixty-eight percent for secondary (OPI) and thirty-two percent for postsecondary (OCHE).

As required, an equal amount of state of Montana General Fund dollars will be expended for state administration under Section 112(a)(3).

Allocations for Secondary CTE Programs

OPI distributes funds on an annual basis for secondary CTE programs to LEAs according to the following formula, as determined in the Perkins Act:

- The total amount allocated for distribution for secondary education CTE (other than the Reserve Fund) will be \$2,759,391
- Of this amount, seventy percent of the available funds was allocated to LEAs based on the census data for school system enrollment for the number of children in poverty aged 5-17 for the previous school year.
- Thirty percent of the available funds was allocated to LEAs based on the AIM enrollment data for the number of children aged 5-17 for the previous school year.

Allocations for Postsecondary CTE Programs

The total amount allocated for distribution for postsecondary education CTE (other than the Reserve Fund as noted in Section 6.1) is \$1,485,826 for current fiscal year.

Of this amount, funding for postsecondary programs is determined by dividing the number of Pell grant and Bureau of Indian Affairs program recipients enrolled in the two-year postsecondary institution by the total number of Pell Grant and Bureau of Indian Affairs program recipients in the state. Each two-year postsecondary institution must qualify for at least \$50,000 before a grant is awarded.

VI. Conclusion

The introduction of the Montana Perkins Multi-Year State Plan places the value of its work within the context of the Montana Board of Regents' strategic plan for 2006-2010. The Regents' plan points out the changing skill needs for economic success in the 21st century.

"What has changed (over the 100 years since Montana gained statehood) is the minimum level of education necessary to successfully participate in our society and economy. Postsecondary education has long been a gateway to success for our best and brightest and more privileged citizens. Now it is essentially a requirement for almost everyone. Many years ago, an eighth grade education was recognized as sufficient for most citizens. This gave way to a standard that a high school diploma was necessary for entrance to the middle-class and the chance to have a comfortable life. In the 21st Century, the hurdle has plainly moved to where at least some postsecondary education is now necessary for even modest prosperity in any high-wage, industrialized economy."

Recognizing this reality, the State of Montana begins implementation of the Carl D. Perkins Career and Technical Education Improvement Act of 2006. Through the resources made available from this Act and the state and local funding for career and technical education that is leveraged through the federal funds, the State is moving forward to update career and technical education services and provide more options for students wishing to pursue postsecondary

studies. The complete State Plan can be accessed at the OCHE Workforce Development website: <http://mus.edu/wd/>.